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ABSTRACT

The purpose of this study is to understand how Portuguese social workers perceive education and work as a way to grow as professionals in the field. This qualitative study takes place within a very specific organizational context--the Portuguese social security--and investigates how eight social workers: (1) perceive their education (including in-service training); (2) value educational contexts for their professional development; and (3) define their professional identities. The main conclusions of this study point to a close relationship between education, professional trajectories, professional identities, and the willingness to be educated. The dynamic among these factors is activated by the representation that subjects have of their profession, by contexts and conditions of exercising it, and by educational opportunities to improve their practice and to (re)define their professional identity. (Contains 15 references.) (Author/GCP)

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Profession, Identities & Education: A Collective Case Study with Portuguese Social Workers.

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PROFESSION, IDENTITIES & EDUCATION: A COLLECTIVE CASE STUDY WITH PORTUGUESE SOCIAL WORKERS

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ABSTRACT

The purpose of this study is to understand how Portuguese social workers perceive education and work as a way to grow as professionals in the field.

This qualitative study takes place within a very specific organizational context – the Portuguese social security – and investigates how eight social workers: (1) perceive their education (including in-service training); (2) value educational contexts for their professional development; and (3) define their professional identities.

The main conclusions of this study point to a close relationship between education, professional trajectories, professional identities and the willingness to be educated. The dynamic among these factors is activated by the representations that subjects have of their profession, by contexts and conditions of exercising it and by educational opportunities to improve their practice and to (re) define their professional identity.

OBJECTIVES

The purpose of this study is to understand how Portuguese social workers perceive education and work as a way to grow as professionals in the field.

Its ultimate goal is to provide a framework for the design and implement of adult education at the workplace, in order to provide education that is adapted to the learners, to their social contexts (e.g., work, family, and leisure), and to their daily practices.

This qualitative study takes place within very a specific organizational context – the Portuguese social security- and investigates how eight social workers: (1) perceive their education (including in-service training); (2) value educational contexts for their professional development; and (3) define their professional identities.

THEORETICAL FRAMEWORK

The theoretical framework, briefly discussed here, is guided by an interest in understanding the relationship between education and work as they relate to the design and implementation of adult education at the workplace.

We firmly believe that adult education should encompass a set of material, symbolic and institutional conditions in order to induce a reflexive and investigative attitude in the actors and

change agents. This conceptualization of education: (1) values informal education at the workplace; (2) recognizes the impact of social contexts (work, family, leisure) on education; and (3) grants the subjects' representations and professional identities a main role on their professional development (Correia, 1991; Honore, 1990).

Adults have unique characteristics as learners and therefore the approaches for helping them to learn must be quite distinct from children and teenagers (Knowles, 1984.) Therefore, it is necessary to find a theoretical framework to support and clarify these different meanings.

Figure 1 depicts the dynamics of adult education and represents the theoretical framework (Honore, 1990; Mezirow, 1990; Mezirow & Associates 1990: Correia, 1995; Alin, 1996) used to support this study.

One of the best ways to understand the relationship between work and education is to look at workers' professional development and identify changes on their professional identities as a result of social, psychological and didactic experiences (Barbier, 1991.) These experiences (the vertices of the triangle in figure 1) offer subjects opportunities to reflect on their own professional representations and identities. Reflection around the questions - What can I do? What is my place? Who am I? – is the core of this triangle.

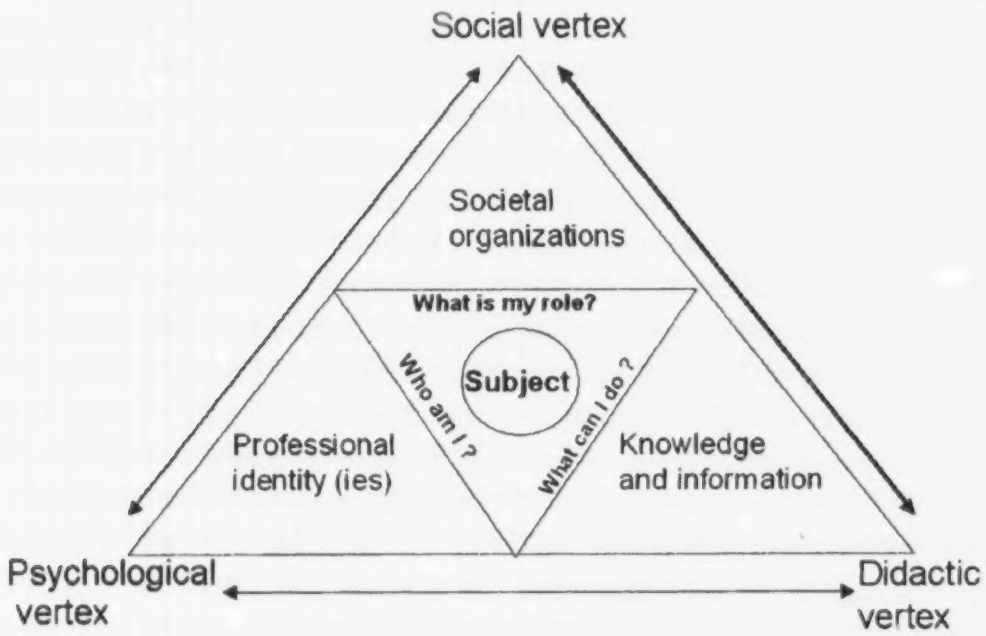

Figure 1 – Dynamics of adult education.

Today, workers at all levels are called upon to think differently and more deeply about themselves, their work, and their relationship to the organization (Marsick, 1990.) Mezirow (1990) points out the following concepts as the new demands for learning in the workplace: (1) reflection on experience; (2) the linkage between personal meaning and the socially created consensual meanings embodied in the organization's culture; and (3) the transformation of

personal frames of reference (it is impossible to separate one's professional, work-related knowledge and skills from the rest of oneself.)

Therefore, adult education is intrinsically linked to the growth of the subject as a person as well as a professional. The subjects as education's centerpiece should be able to ask the questions (Alin, 1996) - What can I do? What is my place? Who am I? – and look for answers.

The meaning that subjects attach to their work and learning is influenced by their own personal histories, which are constructed from experiences with the cultures of families, schools, religions, and communities. However, individual meanings are also influenced at work by the collective meanings and agreements in the organization's culture, that most of the times remain implicit (Mezirow, 1990; Marsick, 1990; Blin, 1997.)

As a member of a profession subjects adopt certain values and attitudes, inherent to the professional identity, of what is regarded as important. Therefore, professional identity (ies) offer uniqueness to different professional groups, and influence the way people who are part of those groups perceive themselves, and also the way others perceive those professionals.

The importance of how individuals perceive and identify themselves within a profession is therefore stressed in this study. Professional identity is seen as a social identity and is, as such, created in relation to others. Sociologist Doyle McCarthy defines a social identity as: "A 'social identity' is the self signified as something or as someone, a signification addressed both to oneself and to others with whom one converses" (McCarthy, 1996, p.77).

Today's society is characterized by recurrent waves of change that impact professions. Different individuals look for different strategies to deal with change. Professional identities evolve and also adjust to change that occurs within the organization, the profession and the society.

In this study we analyzed professional histories and narratives from eight social workers as an attempt to understand how they related to the profession, define work, and see education in relation to their professional representations and identities.

THE PORTUGUESE CONTEXT

The primary goal of a welfare state is to materialize the formal rights of all citizens and to provide minimum material of well-being for all citizens (and not only to those who pay taxes). In opposition, a liberal state provides professional services that are available on the market (Torstendahl and Burrage, 1990.) In the Portuguese case a set of rights are included as old-age pension, sick-leave pension, maternity and parental leaves and allowances, child allowances and financial supports to low-income families.

Currently the Portuguese social security is undertaking a progressive reform that includes a diverse set of measures, such as: support financially families in general, but specifically low income families; actualize seniors old-age pensions; fight against poverty and protect at-risk children and teenagers.

The main competences of a Portuguese social worker are: (i) to make inventories of needs and resources; (ii) to diagnose situations of poverty and social exclusion; (iii) to set up shelters to the marginalized and abused; (iv) to provide means of social integration to individuals and families; (v) to assess individuals, families and groups (e.g. gypsies) socio-economic status to provide solutions to their problems; (vi) to prevent situations of social exclusion; (vii) to offer protection and integration in the communities to under-served families and groups; (viii) to develop and implement programs that involve different communities; and (ix) to evaluate programs and projects undertaken to improve social interventions.

Social work as a profession developed rapidly during the twentieth century. In Portugal, social work was formally institutionalized during the thirties. In the following decades, social work in Portugal strived for development of a unique professional identity.

The seventies were the golden era for social work. As a result of the expansion of the welfare state, social workers established a set of values, norms, skills, knowledge and relational qualities that empowered the profession and conferred upon it a unique identity. Thus, soon the demands of bureaucratization of public service and a drive for efficient indicators of excellent practice, in technical sense, brought to the profession a strong administrative component.

Being, social work, a profession that as developed in paralleling to the expansion of the welfare state, social work in Portugal encompasses a strong facet of indetermination and an inherent inability to be assessed based on concrete and objective criteria. However, social work can be perceived as a profession that includes a set of theoretical foundations from diverse fields (Psychology, Sociology, Anthropology, Psychoanalysis, Economy and Law), a practical knowledge with a focus on relational qualities and a set of values that address a strong professional ethics. But, having its theoretical foundations coming from such a wide range of disciplines makes difficult to the field of social work having a homogeneous corpus of knowledge as reference.

The search for a corpus of knowledge and the struggle to get accreditation caused deep changes in the profession. The result of social recognition was the loss of a professional ethic based on a humanitarian interest and efficiency as a value as well as a rationalization of practices required by budgets and costs (Fino-Dhers, 1994.) These changes caused divergences within the profession, and initiated a professional identity crisis.

METHODOLOGY

Mode of inquiry

This research did not attempt to find products or test hypotheses, but looked for a meaning given by the subjects in their natural context based on an inductive analysis of the data. So a qualitative method was the best approach to use in addressing these purposes.

Based on Lincoln and Guba's (2000) different paradigms, we chose the constructivist or interpretative paradigm to frame this research as it is the most coherent and consistent with the research objectives.

In the constructivist paradigm, the search for making-meaning around the social phenomena is the ultimate goal. Focusing the study on how social workers perceive their education, value education contexts for their professional development, and define their professional identities would make subjects' perceptions and interpretations the center of analysis.

Research Strategy

A collective case study (Stake, 1995) was the research method used. We felt that if we chose several subjects rather then just one we would get a deeper understanding of how social workers perceive education and work as a way to grow as professionals. Therefore, this study involved eight social workers that worked at a sub-regional section of the Portuguese social security department. The data collection took place from September 1998 to December 1998. We looked for a variety of cases. Thus, diverse ages, professional experiences, positions and working years were the criteria for cases' selection. However, the subjects were all females, as social work in Portugal is mainly a women's profession.

Data Collection Methods

(1) in-depth semi-structured interviews.

As Stake (1995) points out, case study fieldwork regularly takes the research in unexpected directions, so too much commitment in advance is problematic. Thus, we used a flexible list of issues-oriented open-ended questions to guide the interview. However, based on a pilot study involving three social workers and other researchers in the field feedback, some changes in the original interview script were made. The interviews were audiotaped.

(2) document analysis

Social security's regulations and organizational charts were analyzed. The idea was get a detailed description of the context as well as to confirm/disconfirm the patterns identified during data analysis collected during the interviews.

Data Analysis Methods

In the data analysis methods, a cyclic inductive process of analysis and gathering of data was used. Trends and discrepancies were looked for through a careful analysis of the data and emergent categories were defined.

First, a detailed description of each case and themes within the case was done. Then a thematic analysis across cases - cross-case analysis – was completed.

We used the Non-numerical Constructed Data Indexing Searching and Theorizing –NUDIST – software as a tool during the data analysis.

Validation

Triangulation was used as a procedure to find the validity of the data collected (Stake, 1995.) The following levels of triangulation were used:

(1) Data source triangulation – looked if the phenomenon remains the same across cases.

(2) Investigator triangulation – showed the data to other researchers and got feedback.

(3) Methodological triangulation –in-depth semi-structured interviews and document analysis were completed to increase the confidence of the interpretation.

(4) Member checking - each of the interview transcripts were shown to participants and they were requested to examine the material for accuracy of content and "taste."

(5) Peer review - feedback and comments were received from our peers at the University of Minho and University of Porto.

ANALYSIS AND INTERPRETATION

Three major categories emerged from the in-depth semi-structured interviews and the document analysis: (1) education and life trajectories; (2 ,professional trajectories and definition of a professional identity; and (3) education approaches for professional development.

Due to the scope of this proposal, we are reporting only the most relevant results. Pseudonymous were used for the eight participants in this study – Hannah, Pearl, Carla, Megan, Fran, Greta, Mary and Trish.

(1) Education and life trajectories

Life and education intertwines in a web of knowledge, experiences and values. The choice for the social work profession comes mainly from perceptions brought by relatives and friends who

worked in the field. Practice is extremely relevant as source of knowledge and the affective domain is the most valued ground for learning.

All subjects have chosen to be social workers because they felt they could do something to help the marginalized and abused. Social work was a passion for them. The drive for changing "what is wrong" is a common link between the eight participants. As Pearl put it: "My concern with the others, specially with the ones more marginalized and in need (...) was always a priority for me...these values are deeply rooted in my mind."

The learning experiences are organized according their impact and relevance to the subjects as professionals and as persons. Fran says, "I cannot disconnect my profession from my existence as human being." Their education and life trajectories intertwine in a complex manner.

Day-by-day reality is an excellent arena to practice what they had learned in college and in-service training, but it was also a space to learn from successful and unsuccessful stories. Their clients – the socially excluded and marginalized – were the best "teachers." Mary mentioned that the families with whom she had been working were definitely the best source of knowledge for her.

In professional contexts, learning takes place mainly in the affective domain (in detriment to the cognitive domain). Interpersonal skills are central for those women's professional lives. Successful work with their teammates, colleagues and clients depends on those skills. As Mary says, "I love to work in teams...I've always been working as part of a team... where knowledge crosses boundaries and different talents come together."

The interpersonal experiences with teammates, colleagues, other professionals, and their clients were pointed to as exceptional learning opportunities for relational qualities and ethical principles. These seem to be the main attributes that characterize these social workers' professional identities.

(2) Professional trajectories and definition of a professional identity

Idiosyncrasies in the professional trajectories are viewed as a result of not only different life stories, but also as a result of social, cultural and work conditions. In Portugal, the eighties and nineties have been marked by high rates of unemployment, which generates high indices of anxiety among workers, especially among those who aspire to positions associated with more professional security (e.g. working in public services.)

Professional trajectories are distinct among the subjects. The oldest in the profession - Hannah and Greta - were at the top of their careers. Therefore, they were able to describe their professional project and state their future plans without difficulty.

In opposition, the less experienced – Carla, Megan, Fran, Mary and Trish – had difficulties stating future plans because they were still interns and did not know if they would get a permanent job in the organization. They felt a strong need to gain professional security, which was equivalent for some of the subjects, to "emotional stability." Fran, who has been an intern for ten years, finds her situation is particularly ill-defined regarding her future professional projects.

All the less experienced participants experience negative feelings towards potential advancement opportunities. Because Social Security, as an organization, rarely offers opportunities for promotion, they feel that their work is not valued as it should be. However, when referring to the work context, they all show positive feelings. These are expressed in terms of their achievement as professionals when they look at the impact they have on the lives of the social excluded and marginalized. In addition, the partnerships they create with their clients, among other social

workers, and professionals from other institutions is extremely valued. As Greta describes it, "...our professional development come from working in partnerships – I believe that the social security, in this regard, is one of the organizations, that in terms of service give us a huge experience in this domain – specially now that we talk so much about solidarity...the social security has been doing this since a long time."

However, they all agree that the work conditions (organization of work, resources, relationships and access to education) were important constraints to the profession. One of the main sources of constraints is the lack of resources. This generates anguish and anxiety among the participants. As Greta explains "...sometimes I feel anguish and frustration due to the lack of human/material resources and the overload of work under my responsibility. Sometimes I cannot do my job as well as I wish and when this happen I feel a certain anxiety..."

With exception of Megan who would like to change her professional focus, all the others expressed a desire to continue work as social workers at the social security even though promotion opportunities are very scarce. They recognize their work context as important to fostering a sense of professional identity. They portray an intense desire to keep learning and growing within the profession, including the less experienced participants. This group describes their current situation, which it is not the best in terms of job security, as a necessary "passage rite" to move to a better position.

The social workers' narratives suggest a close interaction between professional identities and professional activity within their work context.

When asked about the competencies and the qualities of the profession, all the subjects, from the most experienced to the least were unanimous in saying: "I do not know!" or "It is hard!" They were not specific or precise when defining their profession. They were unclear, subjective, and broad in their definitions. In an attempt to express their professional uniqueness, they made comparisons with other professions, and used metaphors such as "social work is an art".

The qualities from the affective domain are perceived as the ones, which truly represent the profession. They are the ability to help others, to empathize with others, to be tolerant and to respect different perspectives. From the cognitive domain the ability to analyze situations and problems is the most valued attribute. Knowledge from several other fields, such as Psychology, Sociology, Anthropology, Psychoanalysis, Economy and Law are pointed to as important theoretical frames of reference to their Social Security practice.

(3) Education approaches for professional development

All the subjects share that education and work should be more articulated. The relationship between education and work includes two dimensions: an opportunity to get advanced training in areas identified as lacking, but also as an opportunity to reflect upon their work among peers. All social workers point to a huge discrepancy between the contents delivered by formal education and the knowledge required by real work situations. This is an enormous source of apprehension among professionals in the field. While recognizing the value in formal education, what they look for is for are opportunities to reflect and discuss challenges and issues faced in their daily practice. When asked about in-job-training, they are unanimous in pointing out its importance in initial phases of the profession, but also its relevance throughout their entire professional trajectory.

Instead of offering solutions to hypothetical problems, education should offer opportunities to reflect with other professionals about real problems and to share experiences/issues. As Mary puts it, "the best of education is to offer an opportunity to 'morrow' sorrows, to manage

anguishes and even conflicts ... in one word, to reflect and based upon our practice (...) alternatives solutions and points of view come from reflection."

Professional development needs to offer not only opportunities to improve content-related practices but also opportunities for reflection upon practice and social interventions.

CONCLUSIONS

We are aware that these interpretations must be circumscribed only to the cases analyzed. Consequently, it is not our intent to make any generalizations.

The main conclusions of this study point to a close relationship between education, professional trajectories, professional identities and the willingness to get educated. The dynamic among these factors is activated by the representations that subjects have of their profession, by contexts and conditions of exercising it and by educational opportunities to improve their practice and to (re) define their professional identity.

Reflection seems to be one of the main assets of the educational experience. Because of profession idiosyncrasies (problems are not highly technical in nature, ambiguity is the norm and problems are highly ill-structured) social workers feel an urge to be reflective in their profession to cope with their daily practice.

If someone is not well balanced in personal relationships, he/she will bring imbalance and tunnel vision into workplace decisions and human interactions (Marsick, 1990.) The belief that life outside and inside the workplace is as important as formal education implied from the subjects' narratives.

EDUCATIONAL IMPORTANCE OF THE STUDY

The first author of this proposal was herself a social worker at the Portuguese social security. Being immersed in the field made her realized that most of the times the education offered to social workers strongly relies on prescribed and formal training. She also felt that most of her colleagues including herself were disappointed with such an approach as it was rendered useless when transferred to practice.

This research provide some insights to understand how education paths and professional trajectories are related and how social workers' professional representations and identities can inform the design and implementation of adult education that is adapted to subjects' profession, social contexts, and practice.

This study offer an alternative perspective of adult education showing that Portuguese social workers' perceived education more as an opportunity to reflect upon their practices than as a set of prescribed solutions.

Using Marsick's words (1990, p.29), a change from "the programmed knowledge of the past" into "the questioning insight is needed for the future."

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